

**SUPPORT STAFF PERFORMANCE REVIEW PROCESS**

**Non-Probationary Employees**

1. **PURPOSE**

Performance management is an ongoing developmental process. As part of overall performance management, the annual Performance Review provides an opportunity for a comprehensive discussion with employees regarding their overall performance, recognizing past achievements, helping them continuously improve and motivating future performance. The review will involve:

* Identifying areas of strength and areas requiring improvement
* Determining progress against previous year's objectives
* Assisting employees in career development
* Ensuring a current, accurate Position Description Form (PDF) is in place (Article 16.1)
1. **PRINCIPLES**

Continued development is an integral component of performance management and this is an opportunity to assist individuals in continuously improving their performance. The job performance for the entire performance period is the basis for the performance review. Only factorsrelated to job performance are included in the review and they are rated in an objective manner. Providing the employee with meaningful comments is of critical importance in terms of recognizing their strengths as well as identifying areas for further development. Assigning a rating of “Needs Improvement” should build upon previous feedback already shared with the employee; constructive feedback should never be exchanged for the first time in a performance evaluation.

1. **PROCEDURES**

Employees who have completed their probationary period will have their performance reviewed annually. Performance reviews will be completed between July and November. The period under review is from July 1 to June 30th.

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| **WHEN** | **SUPERVISOR** | **EMPLOYEE** |
| **Prior** to the performance evaluation meeting | * Review the PDF for currency & accuracy
* Prepare a copy of the Performance Review Form for discussion
* Rate the performance
 | * Review the Performance Review Form (template) to acquaint oneself with the content of what is being evaluated
* Prepare for discussion with the supervisor about professional development needs

The employee’s rights concerning performance appraisals are found under Article 16.1 of the Collective Agreement. |
| **At** the performance review meeting | **SUPERVISOR & EMPLOYEE*** Discuss any changes to the employee’s current PDF
* Review last year’s performance evaluation; candidly discuss follow up actions listed
* The employee is provided a copy of the current year performance review form, as prepared by the supervisor
* Discuss the current performance evaluation
* List up to three (3) objectives for the coming year (Section D)
* Identify skills and knowledge areas for planned development (Section E)
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| **WHEN** | **SUPERVISOR** | **EMPLOYEE** |
| **After** the performance review meeting | * Provide a copy of the final performance review form to the employee for signing
* Ensure the final performance review form is signed by all parties
* Provide the employee with a signed copy of the performance review form
* Update the PDF, if required
 | * Review the PDF with the supervisor
* Review the final performance evaluation form; add comments, if desired; sign-off on the form
* Return the signed copy of the performance evaluation form to the supervisor within seven (7) days from receipt (as per Article 16.1, Support Staff Collective Agreement)
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**ANNUAL SUPPORT STAFF PERFORMANCE REVIEW FORM (Long)**

Non-Probationary Employees Only

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| --- | --- | --- |
| Review Period  | From: | To: |
| Employee Name: | Position: |
| Supervisor Name: | Department: |
| **POSITION DESCRIPTION FORM (PDF) REVIEW**Supervisors please note: To comply with Article 16.1 of the Support Staff Collective Agreement, “…in preparation for the performance appraisal process, the Supervisor shall review the employee’s PDF to determine if it is current.” ↓Check the appropriate box below and follow the directions provided:□ **No Changes.** PDF reviewed; no updates. No further action required by supervisor.□ **Minor Changes**. PDF reviewed & updated for housekeeping and clarity. Re-evaluation not anticipated. Supervisor forwards electronic version of the updated PDF (with changes identified) to HR for final review and processing. HR will distribute final copy of the PDF back to supervisor for signing with employee.□ **Substantial Changes**. PDF reviewed & updated with substantive changes. Supervisor forwards electronic version of updated PDF (with changes identified) to HR for review. HR will notify supervisor of next steps including the potential for the PDF to be re-evaluated by the Job Evaluation Committee.  |

**SECTION A – CHARACTERISTICS/BEHAVIOURS**

**Instructions:** Supervisors rate the employee on characteristics/behaviours pertinent to job performance. Carefully evaluate each of the characteristics separately, based on recurring, day-to-day performance since the last review. Definitions pertaining to the rating scale are provided below. In some cases a particular characteristic/behaviour may not be applicable to the position. In these cases, note “N/A” in the Comments section and do not rate the characteristic/behaviour.

**Definitions:**

Above Performance Expectations means that core duties are performed in a manner that went beyond expectations. Required minimal direction in demonstrating this level of performance.

Fully Successful means that performance consistently meets job requirements. Successfully fulfilled all core duties of the position.

Partially Successful means some core duties were performed with partial success.

Needs Improvement means some or all core duties were performed unsatisfactorily. Performance did not meet expected performance objectives. A performance improvement plan is required.

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| --- | --- | --- | --- | --- |
|  | Above Expectations | Fully Successful | Partially Successful | Needs Improvement |
| **Knowledge** – Understands procedures, policies, and duties required for the present role. | □ | □ | □ | □ |
| **Quality of Work** – Demonstrates thoroughness and accuracy with all work. | □ | □ | □ | □ |
| **Productivity / Dependability** – Generates quantity of work congruent with established position requirements and timeframes and meets expected commitments. | □ | □ | □ | □ |
| **Service Delivery** – Responsive and proactive with customer/client, student, and College needs. Delivers services in a professional, respectful and responsive manner. | □ | □ | □ | □ |
| **COMMENTS:** Supervisors to add their comments relating to the above four characteristics/behaviours. If a “Needs Improvement” rating was given, this section must be completed. Identify the specific characteristic/behaviour and provide specific examples and details.   |

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| --- | --- | --- | --- | --- |
|  | Above Expectations | Fully Successful | Partially Successful | Needs Improvement |
| **Written Communication** – Communicates clearly, concisely, and accurately. Includes letters, emails, reports, proposals or other written documents. | □ | □ | □ | □ |
| **Verbal Communication** – Communicates clearly, concisely, and accurately. Delivers timely, supportive, and constructive feedback. | □ | □ | □ | □ |
| **Active Listening** – Listens effectively by questioning for clarity and by focusing attention on the speaker. | □ | □ | □ | □ |
| **COMMENTS:** Supervisor’s comments relating to the above three characteristics/behaviours. If a “Needs Improvement” rating was given, this section must be completed. Identify the specific characteristic/behaviour and provide specific examples and details. |

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| --- | --- | --- | --- | --- |
|  | Above Expectations | Fully Successful | Partially Successful | Needs Improvement |
| **Judgement** – Recognizes problems and responds by gathering and analyzing information while developing options and solutions. | □ | □ | □ | □ |
| **Decision-making** – Applies relevant information to make timely and effective decisions. | □ | □ | □ | □ |
| **COMMENTS:** Supervisor’s comments relating to the above three characteristics/behaviours. If a “Needs Improvement” rating was given, this section must be completed. Identify the specific characteristic/behaviour and provide specific examples and details. |

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|  | Above Expectations | Fully Successful | Partially Successful | Needs Improvement |
| **Team Oriented** – Establishes and maintains positive relationships. Deals with conflict in a constructive manner. Remains open to the ideas of others. Relates to others in a cooperative and professional manner. | □ | □ | □ | □ |
| **Initiative** – Performs tasks with self-confidence and minimal instruction. Takes responsibility for action and follows through on commitments without prompting. | □ | □ | □ | □ |
| **Creativity** – Creates new ideas/practices to enhance success. Strives to continuously improve. | □ | □ | □ | □ |
| **COMMENTS:** Supervisor’s comments relating to the above three characteristics/behaviours. If a “Needs Improvement” rating was given, this section must be completed. Identify the specific characteristic/behaviour and provide specific examples and details. |

**SECTION B – REVIEW OBJECTIVES**

Review the objectives that were set for this evaluation period. Objectives may tie directly to a Departmental goal or may tie to a job duty where a specific task/project was completed. Definitions pertaining to the rating scale are provided below.

Completed With Excellence means working above expectations; requiring minimal direction; being proactive; resolving unanticipated problems.

Completed means the objective was completed.

Not Completed means the objective was not completed.

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| --- | --- | --- | --- |
|  | Completed With Excellence | Completed | Not Completed |
| 1. | □ | □ | □ |
| 2. | □ | □ | □ |
| 3. | □ | □ | □ |
| **COMMENTS:** Supervisor’s comments relating to the above objectives. |

**SECTION C – OVERALL EVALUATION RATING**

When developing the overall performance rating, it is not intended that supervisors will tally the check marks from the ratings in Sections A and B. It is intended that this Overall Evaluation Rating be a reflection of an individual’s overall performance for the year.

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| --- | --- | --- | --- | --- |
|  | Above Expectations  | Fully Successful | Partially Successful | Needs Improvement |
| Overall Evaluation Rating for the Year | □ | □ | □ | □ |
| COMMENTS (Supervisor): |
| COMMENTS (Employee): |

**SECTION D – OBJECTIVES FOR THE COMING YEAR**

List up to three (3) objectives for the coming year. Objectives may tie directly to a Departmental goal or may tie to a job duty where a specific task/project is to be accomplished. Objectives should be specific, measurable, achievable, relevant, and time-bound (SMART).

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| Objective #1: |
| Objective #2: |
| Objective #3: |

**SECTION E – PROFESSIONAL DEVELOPMENT PLAN**

Discuss a development plan with your supervisor that identifies skills/knowledge areas for further development in your job duties. This should relate to the areas rated as “Needs Improvement” from your performance evaluation as well as to your objectives from Section D. Identify possible timing and possible learning options to be pursued. Individuals are still responsible for adhering to the established P.D. approval processes.

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| **Focus Area** | **Developmental Strategies** | **Approximate Timeframe** |
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**SECTION F – SIGNATURES**

**EMPLOYEES NOTE:** Signing the Performance Review Form does not necessarily signify agreement. Signing the form indicates that a copy of the evaluation has been received by you. Employee rights concerning performance appraisals are found under Article 16.1 of the Support Staff Collective Agreement.

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| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Immediate Supervisor (Evaluator) | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Employee | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Immediate Supervisor of Evaluator*(to ensure completion of review)* | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date |

**For Human Resources Only:**

□ Reviewed by HR Consultant (Initials) \_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_ JEC Review? □ Yes □ No